Monday, March 3, 1986

Advertising Age®

Crain's International Newspaper of Marketing © Entire contents copyright 1986 by Crain Communications Inc. All rights reserved.

Plaque fighters amass ad artillery

Big Four jockeying for share

By LAURIE FREEMAN

The $1 billion dentifrice industry is in a lather, as most of its companies scramble to counter Procter & Gamble's heavy introductory spending for Crest Tartar-Control Formula paste and gel in pumps and tubes.

P&G apparently has managed to stop Colgate's surge and reestablish a more comfortable market-share lead.

And, although vastly outspent by competitors and losing share, Minnetonka is hoping to "out-innovate" them once again with an entirely new product form, a plaque-fighting chewing gum.

The new entry is slated for test-marketing under Minnetonka's Check-Up brand name.

At the same time, the big four toothpaste marketers have stepped up marketing efforts for their brands:

- P&G has launched a new tv campaign for its market-leading Crest brand, while continuing heavy promotion for the Crest Tartar-Control Formula line extension. P&G also introduced a gel version of Tartar-Control Formula (AA, Feb. 24).
- Colgate-Palmolive Co. is buying a heavy schedule for an innovative new tv spot, "WMFP," for its Colgate brand.
- Lever Bros. has broken a new campaign for Aim toothpaste, themed "We're aiming for zero cavities."
- Beecham Products has introduced a new "economy-size" pump dispenser, while positioning Aquafresh as the "triple-protection" plaque fighter.

Minnetonka shook up the market by introducing Check-Up, the first plaque-fighting toothpaste in a pump dispenser, three years ago (AA, May 9, '83). It took the four big toothpaste marketers two years to catch up and bring their own products to market—Beecham Products with Aqua-fresh, Colgate-Palmolive with Dentagard, Lever Bros. with Aim and P&G with Crest Tartar-Control Formula (AA, March 18). They have outgunned Minnetonka in advertising and promotion with combined ad spending of more than $100 million last year.

P&G alone spent an estimated

(Continued on Page 70)

Minnetonka this month opens up a new frontier in oral care, testing Check-Up plaque-fighting chewing gum in three cities. A tv campaign, themed, "When you can't brush, chew," is handled by Bozell, Jacobs, Kenyon & Eckhardt, Minneapolis.

Creative toothpaste ads? From Ted Bates? Bob Garfield calls them "seductive." P. 64.

Johnston paved way for O'Donnell

Why JWT nursed ceo pick

By STEWART ALTER

The way J. Walter Thompson Co. tried manufacturing suspense in the search for client Burger King Corp.'s Herb is nothing compared with the buildup the agency is giving its own Joe.

The agency's process to disclose its new top executive—in which the losers are, oddly enough, paraded out one by one before the victor is proclaimed—is a shrewd strategy, agency sources say, to gain the agency the maximum amount of attention and publicity for the winner: Joseph O'Donnell, now exec vp-general manager of J. Walter Thompson USA, Chicago.

The resignation last week of Walter O'Brien, 50, vice-chairman/director, multinational client services, passed over for the top spot, was not the surprise it seemed. "It has not been appropriate to announce his decision until now," said Don Johnston, chairman-ceo of both the parent JWT Group and the Thompson agency, the man whom Mr. O'Donnell is to succeed as ceo at the Thompson agency this week. "And Wally has handled this in a very manly and gracious fashion. He's been a real professional."

Sources say the back-to-front way in which the high drama is unfolding to its climax reflects not only a desire for maximum exposure for Mr. O'Donnell in the important New York ad community, but also Mr. Johnston's resolve that this succession be handled better than his own ascension to power.

Mr. O'Brien's departure follows by a week the nomination of Burt Manning, chairman-ceo of JWT/-USA, to the board of JWT Group, a move that tipped the fact he would not be Mr. Johnston's successor (AA, Feb. 24).

And while the actual events themselves are unexpected, they contrast greatly with those of 1974, when Mr. Johnston, a compromise candidate in a power struggle, was named to head an agency plagued by client departures, personnel unrest, money-losing subsidiaries and eroding profits.

"Don does remember what it was like and he has very carefully

(Continued on Page 72)

Last Minute News

Canada goes 'next door' with $14M campaign

New York—Canadian tourism gets a boost from a $14 million campaign breaking today in 36 U.S. markets. Three 60-second and three 30-second tv spots will run through June. Color spreads will run in national consumer magazines through August. The effort is themed "Come to the world next door." Camp Advertising, Toronto, created the campaign for Tourism Canada, a government agency.

Quaker oatmeal spots take health angle

Chicago—Quaker Oats Co. is testing a series of four health-related tv spots for its Quaker Instant Oats in Marion, Ind.; Midland, Tex., and Williamsport, Pa. The commercials claim Quaker oatmeal helps reduce blood cholesterol levels and note high cholesterol levels' link with heart disease. Backer & Spielvogel handles.

(Continued on Page 8)

Marcos exit plays havoc with Filipino newspaper, tv ads

By LYNNE REAVES

Manila—The revolution that drove Ferdinand Marcos from his 20-year rule and put Corazon Aquino into power has left the Philippines advertising industry in shambles.

Tv stations have been knocked off the air indefinitely, newspapers still are being effectively boycotted by readers and advertisers and some advertising agencies may suffer long-term effects from their connections with the Marcos regime.

As Coca-Cola, with its Marcos links, kept a low profile, the first tv spot to air following Mrs. Aquino's ascension to power was a Pepsi-Cola call to its "New generation."

Observing recent events, Teddy Jurado, president, Assn. of Accredited Advertising Agencies, said, "The advertising industry is in disarray. Media placement on tv is especially a problem. We will be having emergency meetings to decide what to do."

"We estimate that during the four days of the actual revolution, from Saturday through Tuesday, advertising dropped by 75% nationwide," said Don Dillon, president of McCann-Erickson here.

"Advertisers did not want to be seen this time. They thought it was inappropriate. Just about the only ads left running were movie ads," he added.

Advertisers who did not voluntarily withdraw from the five tv channels quickly had it done for them as rebel troops took over studios and knocked out transmitters.

Government-owned Channel 4 went off the air, but resumed broadcasting four hours later with a skeleton staff of Mrs. Aquino's backers at the anchor desk.

Channel 4 programing remained chaotic, but 22 hours after Mr. Marcos left the country the "new Channel 4" aired its first commercial. With great fanfare, the announcers introduced the commercial—appropriately, the Pepsi-Cola "New generation" spot.

"We met with the Pepsi people the night before and decided to

(Continued on Page 72)

NEWSPAPER

Lorenzo vs. Burr:

3

WASHINGTON DC 20014
4520 EAST-WEST HWY #800
SRI ACQUISITIONS
CONGRESSIONAL INFO SERVICE
CONGLI AA 860999 99 COA
*********5-DIGIT 20014

HIGHLIGHTS

Dentifrices brace for fight 1
The $1 billion dentifrice industry is in a lather, as most of its companies scramble to counter Procter & Gamble's heavy introductory spending for Crest Tartar-Control Formula.

JWT's O'Donnell intro 'shrewd' 1
The way J. Walter Thompson Co. tried manufacturing suspense for client Burger King Corp.'s Herb is nothing compared with what the agency is giving Joseph O'Donnell. The agency's process to disclose its new top executive—in which the losers are paraded out one by one before the victor is proclaimed—is a shrewd strategy to gain the agency maximum publicity for the winner.

Minis aside, NBC strong 3
CBS may have won both clashes of the miniseries titans during the February sweeps but NBC still will win the seasonlong Nielsen ratings war. Only a total prime time ratings collapse between now and April 20 could prevent the "peacock network" from snaring its first seasonlong household ratings win in years.

Seven-Up lines up juice 4
Seven-Up Co. finally has an answer to the juice-based soft-drink segment, which for nearly two years has been slicing away at its dominant share of the lemon-lime market.

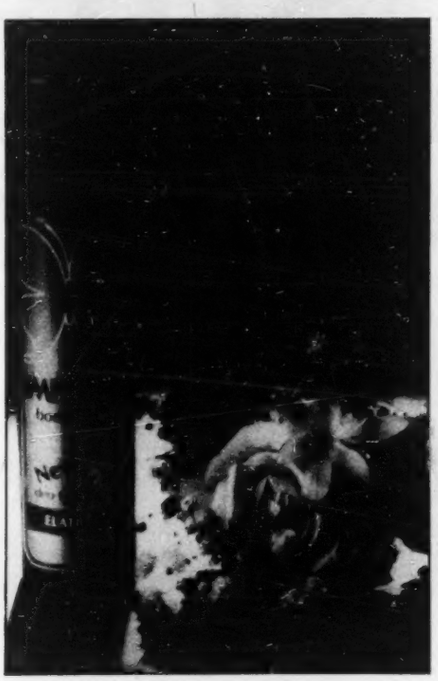
DFS, Dorland find a way 6
The agreement by Dancer Fitzgerald Sample and Dorland Advertising to create DFS Dorland Worldwide, a $1.2 billion agency, meets the needs of both agencies with a novel approach to questions that haunt agency mergers the world over.

Within the Reagan line 12
Daniel Oliver, the conservative Republican slated by the White House to be the next chairman of the Federal Trade Commission, cruised through a Senate confirmation hearing last week without straying from Reagan policy on key advertising issues.

Pen makers get ball rolling 35
The nation's leading pen companies are writing a new chapter in their marketing battles as they introduce a new generation of rolling-ball pens. In the latest moves to dominate the $907 million, 3.5 billion-unit category, four companies in spring will bring out products in the hottest segment of the field.

C-E shows overseas losses 43
Interpublic Group of Cos. lost more than $6 million on Campbell-Ewald International's overseas operations from 1981 to 1984, according to a public filing on the formation of Lowe Marschalk Worldwide in the U.K.

War toys spark conflict 44
They are known as action figures, superheroes or war toys, depending on one's point of view. But whatever they're called, they are generating record sales for the toy industry. Those numbers have attracted the attention of some who question the morality of producing such toys for and marketing them to the very young.



Lever Bros. 'Elated' 46
Trying to revive body sprays and expand its beauty-aids business, Lever Bros. is introducing a new deodorant/fragrance, Elation. Elation will be part of the Impulse body spray line launched in 1982, when body sprays were a promising new category.

Jim Beam ads off beaten path 67
From the looks of its new campaign, James B. Beam Distilling Co. would rather change while it's ahead than hang on to a traditional image whose appeal is fading. While other leading bourbon marketers continue to wrap their brands in down-home Americana, new Beam ads, themed "Now you've got everything but the Jim Beam," stress the product's versatility by prominently displaying mixing options, such as tonic and orange juice.

INTERNATIONAL

Frenzy on Fleet Street 40
In a special report, Advertising Age examines the newspaper industry in the U.K., where a new tabloid called *Today* is scheduled to be launched this week. The newspaper is causing a sensation in London publishing circles, where executives are speculating that *Today* could change the way Fleet Street operates. And while newspaper moguls and print union officials ponder the long-term effects of *Today* on the newspaper industry, advertising and marketing executives are wondering about changes in newspaper advertising rates. Since news of *Today* hit the streets, a handful of imitators has declared plans to inaugurate its own *Today*-style national newspapers. *See Page 41.*

OTHER NEWS

The feud between the chiefs of the country's two largest low-cost airlines could explode as a result of Texas Air Corp.'s planned $600 million buyout of Eastern Air Lines. Page 3.

Stroh Brewery Co. is entering the juice-based soft-drink category in a familiar competitive position: Taking on two corporate giants that dominate the market, in this case Coca-Cola Co. and PepsiCo. Its entry is Sundance 100% Natural Juice Sparkler. Page 4.

Audit Bureau of Circulations' FAS-FAX report for the six months ending Dec. 31 shows many titles registering newsstand sales gains from year-ago figures. Page 36.

Stearns & Foster, anticipating a boom in mattress sales tied to the spring moving season, this week kicks off a $7 million campaign designed to increase awareness for the 140-year-old bedding brand. Page 64.

Ex-football player Franco Harris' celebrated "immaculate reception" will be used in the April broadcast and print media launch of Barbican, Stroh Brewery Co.'s imported nonalcoholic malt beverage. Page 67.

Eighteen months ago, Urban General's unit volume was three times what it is today. But today, the direct marketer's dollar sales are greater than ever. The explanation lies in a stunning revamp of the 8-year-old company that is still best known for its direct-response tv advertising and marketing of products such as the Bamboo Steamer, Steam-a-way, Belly Burner and Parachute Luggage. In Direct Marketing. Page 56.

Sears, Roebuck & Co. will use its newly incorporated Allstate direct-marketing unit to solicit new business from non-Sears clients. In Direct Marketing. Page 56.

COMING THURSDAY

While Keye/Donna/Pearlstein has yet to achieve the national prominence enjoyed by a handful of West Coast agencies such as Chiat/Day, Los Angeles, and Hal Riney & Partners, San Francisco (formerly an Ogilvy & Mather office), it has been steadily gaining momentum by delivering excellent (and sometimes brilliant) creative work. It also has a reputation for sound, intelligent management.

Many view the direct mail that fills their mailboxes and the telemarketing calls that ring at all hours as an invasion of their privacy. As many states respond to these beliefs, direct marketers work to maintain their right to pursue business in an unrestricted environment, a business that generates about $40 million in sales of goods and services, according to the Direct Marketing Assn. Special Report looks at the privacy issue and some companies' direct-marketing tactics.

REGULAR FEATURES

ADBEAT	62	EDITORIAL	17	PRESSTIME	8
ADVERTISER PEOPLE	58	FOR THE RECORD	67	REGIONAL NEWS	52
ADVERTISING MARKETPLACE	59	FORUM	18	VIDEOTECH UPDATE	24
AGENCY PEOPLE	58	GARFIELD/ON THE LOOSE	58	WORLD NEWS ROUNDUP	3
BACK PAGES	50	LETTERS	20		
BRADY'S BUNCH	50	MEDIAWORKS	22	FIGURES TO FILE	
CON-SID-ERATIONS	17	MEDIA PEOPLE	35		
CORRECTIONS & CLARIFICATIONS	6	NEW PRODUCTS	66	NEWSPAPER AD INCHES IN DECEMBER, '85	54
DIRECT MARKETING	56	PHOTO REVIEW	48		

Vol. 57, No. 17—ADVERTISING AGE (ISSN 0001-8899) is published twice weekly except once a week the first week in January, the first week in July, the fourth week in November and the fourth week in December at 740 Rush Street, Chicago, Ill. 60611. Second-class postage paid at Chicago and additional mailing offices. Send address changes to ADVERTISING AGE, Circulation Department, 965 E. Jefferson, Detroit, Mich. 48207. Microfilm copies are available from University Microfilms, 300 N. Zeeb Rd., Ann Arbor, Mich. 48103. Microfiche copies are available from Bell & Howell, Micro Photo Division, Old Mansfield Rd., Wooster, O. 44691. $1.25 a copy on Monday, 75¢ a copy on Thursday, $57 a year, $104 two years. Add $143 per year for air delivery to Europe & Middle East. Add $49 for surface mail to all other foreign countries. WILLIAM STRONG, vp-circulation; JOHN HUFFMAN, fulfillment director; DAVE KELLEY, circulation manager. Four weeks' notice required for change of address. Address all subscription correspondence to Circulation Department, Advertising Age, 965 E. Jefferson, Detroit, MI. 48207 (313) 446-0494.

Beauty market delays scents

By PAT SLOAN

Boca Raton, Fla.—After a year of little industry growth, at least five major beauty marketers are considering delaying 1986 fragrance introductions until 1987 and focusing efforts instead on existing fragrances and other new-product areas.

Executives at the annual Cosmetic, Toiletry & Fragrance Assn. meeting here also expressed concern about the growth of counterfeit goods and discussed how to improve both the public's and government's perception of the value of personal-care products.

A glut of new fragrances, accompanied by constant dollar annual growth of only 2% to 3% in the category for the past few years, may

(Continued on Page 68)

Rivals back GM's heat on media

By JESSE SNYDER

General Motors' print media rate-busting now has other auto makers talking tough.

They expect any concessions or volume discount rates won by GM to be offered to them as well. They predict the rate assault will spread to tv, radio, outdoor and other media. And they aren't above taking a poke at GM for joining the game late.

"We've been tough on magazine rates for a couple of years and it'll get worse before it gets better," said Louis Lataif, vp-sales operations for Ford Motor Co. Ford has cut several magazines from its buy list for refusing its demands and has increased buys in books that coop-

(Continued on Page 70)

West Coast news

DFS wins almond account

California Almond Growers Exchange, Sacramento, Cal., has hired Dancer Fitzgerald Sample, San Francisco, to replace its agency of 28 years, Busse & Cummins, San Francisco, on its $8 million account. The marketer of Blue Diamond brand almonds chose DFS in a review involving the incumbent, Lowe Marschalk, McCann-Erickson, Hal Riney & Partners, all San Francisco, and Needham Harper Worldwide, Los Angeles. The account represented

(Continued on Page 68)

DFS, Dorland find creative solution

Unique $75 million deal tries to avoid conflicts

By STEWART ALTER and LAUREL WENTZ

The agreement by Dancer Fitzgerald Sample and Dorland Advertising to create DFS Dorland Worldwide, a $1.2 billion agency, solves the needs of both agencies with a novel approach to questions that haunt agency mergers the world over.

Among those questions: How can agency principals sell substantial ownership positions without losing control? And how can agencies own more than one network and still avoid client conflict problems?

Last week's agreement allows New York-based DFS and London-based Dorland to go international. It provides Dorland's parent, Saatchi & Saatchi Co., with a second worldwide agency network to complement its Saatchi & Saatchi Compton Worldwide. And it does so through a binding financial arrangement that hedges ownership of the new agency—thus avoiding client-conflict problems with other Saatchi agencies.

Dorland, through Saatchi, will lend $75 million to a new company, DFS Management, which in turn will buy all shares held by DFS' 210 stockholders, including those held by the five top DFS executives.

These executives will retain control of DFS by controlling DFS Management. But while they will pay interest on the loan, they will not repay the principal.

The interest is Dorland's only financial gain. It's also a tax-deductible business expense for DFS—which is, in effect, on permanent loan to its own management.

Like something out of "Alice in Wonderland," these executives own the company but they don't, since they can never repay the loan. The only possible owner is Dorland, which can claim the agency at any time, but which says it won't.

"It is not a phased acquisition," said Jack Rubins, 54, Dorland's ceo and deputy chairman of the new network. "It is exactly what we are describing. We do have an option to acquire, but it is not our intention to exercise that option."

Mr. Rubins described this as "a legal and worldwide way of ensuring separateness." The agencies considered but rejected an autonomy agreement as not being "bulletproof" enough, he said. "This is far more binding than any other form we could find."

The agreement is subject to approval from the U.S., U.K. and DFS' shareholders.

Dorland's option to buy is necessary, the partners believe, because it creates the interlocking financial link that DFS and Dorland believe is required to make the network successful. Observers see no reason why that option wouldn't be executed if client conflicts were no longer a concern.

The conflict issue reportedly was compounded by the fact that all of Saatchi's agencies have auto accounts and by the strict conflict policies of Procter & Gamble, both a DFS and Saatchi client.

P&G also was said to be concerned about having too much of its billings concentrated in one agency company.

The board of directors of the newly formed DFS Dorland Worldwide (appearing clockwise, beginning at lower left): Chairman Stuart Upson, Robert Kennedy, Gary Susnjara, Michael Bungey, William Vickery, Michael Geraghty, Peter McSpadden and Jack Rubins.

"Procter & Gamble is very sticky about conflicts," said analyst Jim Dougherty of Ebertstadt Fleming, New York, a onetime P&G employe who has followed both P&G and agency stocks. "If you want their business, you play by their rules."

But whether Dorland and DFS have danced effectively around the client-conflict issue remains to be seen.

One agency observer likened the deal to saying, "Don't raise the bridge, lower the river."

Emma Hill, an analyst at Wertheim & Co., New York, compared it to following "the letter of the law but not the intent of the law." Mr. Rubins commented, "If there was concern, there can't be now. They [DFS] are not owned by us [Dorland]. We haven't gone to these lengths for the fun of it."

Peter McSpadden, 55, president of DFS Dorland as he has been of DFS, said, "There have been discussions with each of our clients. They've been kept up-to-date, and as far as we know, they're all accepting."

The fact that client conflicts aren't as cut-and-dried as they once were lends strength to DFS Dorland's efforts. A wave of client-side mergers has for now left intact client-agency relationships that might have been vetoed before. And arrangements such as The Interpublic Group of Cos. with its agencies, and The Ogilvy Group, with Scali, McCabe, Sloves, have demonstrated success in this area.

London analysts have given the deal high marks. "Saatchi will have the ability to avoid potential conflicts internationally in the same way as they do in the U.K. now, where Saatchi handles Nissan and Dorland handles Austin Rover," said Richard Dale of the James Capel brokerage house.

DFS Dorland's main offices are DFS ($876 million in 1985 billings), Dorland ($210 million) and Fortune Communication Holdings in Australia ($87 million).

DFS was not able to succeed internationally by itself, Mr. McSpadden said: "We started too late. As a private company, our pockets were not deep enough to make the investments required when we became involved. And there were no major clients to take us around the world."

Besides making DFS international, the deal also resolves questions about the agency's future. Those had revolved around the reportedly large block of stock owned by Stuart Upson, 60, DFS' chairman who is now also chairman of DFS Dorland.

While he and the other four top DFS officers will be tied into five-year employment contracts, he, like everyone else, will be able to sell his DFS Dorland stock upon completion of the deal.

Besides Messrs. Upson and McSpadden, the five top DFS officers include William Vickery, 50, international director; Robert Kennedy, 44, chief financial officer, and Gary Susnjara, 44, director of North American operations. The eight-member DFS Dorland board also includes, from Dorland, Mr. Rubins; Michael Bungey, 45, director-European operations, and Michael Geraghty, 51, director-corporate development.

Saatchi, a public company, will provide the $75 million from its own existing funds.

That price is figured on results from DFS' fiscal year, ended Aug. 31, 1985, in which its billings were $868 million, its pretax profits $17.6 million and net tangible assets $34.7 million.

While that makes the price about two times book value, it will be higher after Dorland makes a further payment in 1991. That payment to shareholders will be the positive difference between what DFS earns in the next five years and $41 million, an $8.2 million per year average that is actually lower than what the agency earns now.

Under general accounting principles both in the U.S. and the U.K., Saatchi can consolidate DFS' assets and earnings into its own financial statements, but it may not exercise that option, sources indicate.#

CORRECTIONS & CLARIFICATIONS

- Billings figures for Young & Rubicam France in the story about Jean-Claude Boulet (AA, Feb. 17, P. 3) should have read $20.5 million for 1970 and $103.8 million for 1982.
- Selling Areas-Marketing Inc. was incorrectly listed as the source of granola bar market shares in a chart (AA, Feb. 17, P. 4). SAMI does not make public brand share data.
- David Tattle, vp-general manager of the Media Research Group, Nielsen-Canada, was incorrectly identified in a Research Beat column (AA, Feb. 17, P. 54).
- Timberland Co.'s new advertising slogan for its footwear line is "More quality than you may ever need." It was stated incorrectly (AA, Feb. 17, P. 62).
- Burger King's share of first mentions in the January adWatch survey was 18%, rather than the 14.9% share (its December score) inadvertently reported (AA, Feb. 24, P. 4).#

SAMPLE IN MALLS
PROMOTE IN MALLS
DEMONSTRATE
EDUCATE
RESEARCH & TEST

Shopping Malls afford the greatest marketing opportunities for live consumer contact.

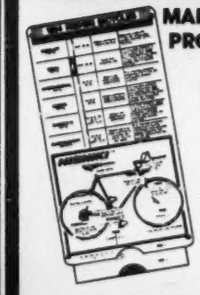
Founded in 1975, Shopping Center Network is the oldest and largest producer of "**Live Event**" **Product Marketing** in the Mall Industry. We service over 50 of the top Fortune 500 Companies.

Call or write, and we'll show you how to integrate Malls into your '86-87 Marketing Plans.

SHOPPING CENTER NETWORK
SHOPPING CENTER NETWORK
SHOPPING CENTER NETWORK

11310 N. Kendall Drive • Suite 303
Miami, FL 33176 • (305) 595-0201
Miami • New York • Los Angeles • Chicago

PERRYGRAF



MAKE YOUR PRODUCTS
EASIER TO BUY
EASIER TO SELL
WITH A
CUSTOM
SLIDE-CHART!

FREE DATA ANALYSIS AND DESIGN SKETCH!

19365 BUSINESS CENTER DRIVE
NORTHRIDGE, CA 91324-3552
(818) 993-1000 • (800) 423-5329

Fleet Street frenzy

Eddy Shah's 'Today' shakes up U.K.

Tabloid could spell new era for industry

Maverick publisher Eddy Shah plans to shake up U.K. newspapers this month with the debut of *Today*. A recent prototype of the new tabloid featured the Super Bowl.

By LAUREL WENTZ

LONDON—Fleet Street, headquarters of the U.K. newspaper industry, will never be the same after this week.

On March 4, upstart publisher Eddy Shah will launch the much-anticipated first edition of his new daily tabloid, *Today* (AA, Oct. 15).

The newspaper uses color lavishly and offers ad rates that are 75% less than most of its competitors. *Today* is also the first U.K. daily to be produced with computerized printing technology and is free of the powerful unions that have stymied other newspapers.

If Mr. Shah's newspaper succeeds—and U.S. international agency heads are betting that it will—it could spell the beginning of a new era for Fleet Street. Some observers believe U.K. newspapers will become profitable enterprises that are as attractive to investors as U.S. newspapers.

New investors

In the past, investors like Atlantic Richfield Co., which owned the *Observer* until the early 1980s, have had to pull out of Fleet Street after mounting losses. But now, global media magnate Rupert Murdoch and Canadian industrialist Conrad Black have reversed the process and are investing heavily.

"Inevitably, the so-called new technology finally caught up with us," said Roy Langridge, assistant chief executive at Ted Bates Holdings. "Rupert Murdoch said the other day that it had been around for 35 years in the U.S. It had to come sometime, and Shah is the catalyst. He's the man who forced the pace."

Until now, there has been little competition on Fleet Street—a five-block stretch in the center of London where most of the U.K.'s national newspapers are published. This is so even though London has nine national morning papers with circulations ranging from 230,000 for the *Financial Times* to more than 4 million for the downmarket *Sun* tabloid.

But most of the papers either lose money or struggle to break even because of huge operating costs, bloated payrolls and labor-union strife.

Sources say Mr. Shah is uniquely qualified to break with tradition. As the publisher of a thriving group of free weeklies—newspapers given away to readers and supported solely by advertising—he is an outsider, unaffected by decades of union bullying.

He is also the only person to successfully fight the printers' unions, emerging victorious two years ago from a bitter and sometimes violent strike at his weeklies. As a result, he has attained a rare credibility in the newspaper industry that has allowed him to raise $24 million to finance *Today* from investors who might otherwise be wary of tangling with the unions.

As a result of *Today*, other U.K. newspaper groups are going ahead with plans to cut their staffs and update their printing facilities, plans that have been delayed by inflexible trade unions. Also, several ailing newspapers have recently been taken over by bottom-line minded entrepreneurs who are anxious to follow Mr. Shah's lead.

Among those leading the way to sweeping change is Mr. Murdoch, owner of the U.K.'s largest national newspaper group, News International.

Mr. Murdoch has already built a $140 million plant equipped with modern printing technology three miles from Fleet Street in Wapping, ostensibly to publish new titles he has yet to launch. The move angered print unions, whose members refused to consider a nonstrike agreement and other concessions Mr. Murdoch wanted for the new plant.

Union calls strike

When he insisted, the 5,500 print union members at Mr. Murdoch's *Times*, *Sunday Times*, *Sun* and *News of the World* went on strike in late January.

To the industry's surprise, Mr. Murdoch fired all 5,500 workers and moved the four titles into the Wapping plant, which has elaborate security systems.

The four newspapers resumed publication at Wapping, where they were produced by members of the single union not opposed to introduction of modern technology, the Electrical, Electronics, Telecommunications & Plumbing Union, the same group that puts out *Today*.

The strike continued, but it failed to halt publication of the newspapers. After the first week, Mr. Murdoch's erratic, makeshift distribution system improved.

"The union hasn't scored many points," said Derek Terrington, an analyst at London stockbroker Grieveson Grant. "So far, Murdoch is leading about 50 points to 2."

Elsewhere on Fleet Street, Czech-born publisher Robert Maxwell, who bought the Mirror Group newspapers in 1984, has frequently threatened to shut down

(Continued on Page 41)

New paper expected to spark ad competition

LONDON—While newspaper moguls and print union officials ponder what long-term effects Eddy Shah's new tabloid *Today* will have on the U.K. newspaper industry, marketing and ad agency executives are wondering about newspaper ad rates.

Because *Today* is produced with computerized printing equipment by substantially fewer staffers than other Fleet Street newspapers, it can offer ad rates that are 75% lower than its competitors.

A b&w page in *Today* costs $6,670, compared with about $25,375 for the same ad in the *Daily Express* or other tabloids, said Ron Brown, *Today's* advertising sales manager.

The price gap is even wider for a color page. Such an ad costs $13,900 in *Today*, while the other tabs charge as much as $63,800, he said. However, agency media directors pointed out that most advertisers are able to negotiate sizable discounts on the older newspapers' rate cards.

"Fleet Street is a very volatile commodity market," said Stewart Butterfield, media director for McCann-Erickson. "The rate card is irrelevant to most buyers." Even so, he added, "There will be more competition [because of *Today*]."

Rumors abound of price wars on Fleet Street, but so far no newspapers have announced they will slash prices.

"You can only get so much advertising into his paper," said Ray Morgan, director of Ray Morgan & Partners, an independent media buyer. "If papers start cutting rates madly, they will only be cutting each others' throats. But there will be more competition between the major titles."

Mr. Morgan and other industry experts agreed that the inexpensive and colorful ads offered by *Today* could lure some major advertisers, such as retailers, back to newspapers.

"It will give newspapers a chance to fight back for the ground lost to television," Mr. Morgan said.

Newspaper advertising in the U.K. totals about $1 billion a year and is increasing by about 9% annually, according to the U.K. Advertising Assn.

Mr. Shah, for his part, appeared confident that he will come out on top.

He claimed that in a market where most of the U.K.'s nine national dailies and eight Sunday newspapers lose money year after year, *Today* will turn a profit in its first year.

He also said his newspaper could make a profit of $30 million a year with a circulation of 1.5 million and a maximum of 37.5% of the paper devoted to ads.

For weekday issues, the newspaper will print 44 pages, including 16 in color, and on Sunday *Today* will run 98 pages.

Today's ad pages already are sold out for the first week of publication and a total of $13 million in advertising already has been sold for the first nine months, Mr. Brown said.

To promote *Today*, Mr. Shah is launching a $9 million ad campaign this week via Wight Collins Rutherford Scott.

The tv campaign features commercials starring dancer Rudolf Nureyev and famine fund-raiser Bob Geldof, a rock musician and member of the U.K. rock group the Boomtown Rats. Mr. Geldof organized last year's Live Aid concert in the U.S. and the U.K. to raise money for Ethiopian famine relief.

To meet the threat of *Today*, the U.K.'s five major newspaper groups are expected to start their own multi-million-dollar advertising campaigns, possibly in early April.

Jim Smith, group account director at WCRS, estimated that Mr. Shah's rivals will spend a total of up to $19 million in advertising to combat *Today*.

He said he expected Mr. Murdoch's News International to spend $4.5 million via Saatchi and Saatchi and that equal amounts will be spent by Robert Maxwell's Mirror Group and by the Express Group.

The remainder will be spent by the *Guardian* and the *Daily Telegraph*, he said.■—*L.W.*

Fleet Street at a glance

First four newspapers are broadsheets, remainder are tabloids. Source: *Audit Bureau of Circulations.*

Title	Owner	Acquired	1985 circ.	1984 circ.
The Daily Telegraph[1]	Canadian entrepreneur Conrad Black	1985	1,211,691	1,247,489
The Guardian	Administered by a trust	1936	487,032	472,438
The Times[1]	News International (Rupert Murdoch)	1980	478,907	418,816
Financial Times	Pearson	1957	231,513	217,430
Sun	News International	1969	4,095,563	4,135,240
Mirror[1]	Mirror Group Newspapers (Robert Maxwell)	1984	3,152,566	3,429,537
Daily Express[1]	United Newspapers (provincial press group)	1985	1,888,856	1,991,801
Daily Mail[1]	Associated Newspapers	1896	1,821,562	1,832,627
Star	United Newspapers	1985	1,444,644	1,502,102
London Standard[2]	Associated Newspapers	1985	495,209	493,955

[1]*Also publish Sunday paper.* [2]*Evening paper.*

Imitation newspapers gear up for launch in wake of 'Today'

By LAUREL WENTZ

LONDON—If imitation is the sincerest form of flattery, Eddy Shah should be blushing.

Since Mr. Shah announced plans to launch *Today*, a handful of would-be imitators, including Rupert Murdoch, have declared plans to start their own Shah-style national newspapers during the next year.

To compete with Mr. Shah, both Mr. Murdoch and Robert Maxwell, owner of the Mirror Group of newspapers, have announced new dailies for this spring, even though Mr. Murdoch already has four newspapers in the U.K. and Mr. Maxwell has three.

Both publishers initially said they would start evening papers in March, but those plans have changed. London has only one evening paper, the *London Standard*.

Instead, Mr. Maxwell announced he will introduce another new morning daily, to be called *Good Day*, and Mr. Murdoch has put his *London Post* on the back burner.

Observers speculated that both publishers changed their plans because research indicates the afternoon newspaper market is dwindling significantly.

"Gross circulation [of afternoon papers] has dropped by about 2 million [in the 1960s] to 500,000 to 600,000 now," said Stewart Butterfield, McCann-Erickson's media director here. "Whether there is enough advertising for two or three competitors, I doubt."

Also, the U.K.'s evening press tends to be regional. The London morning dailies are transported during the night, enabling them to cover the 600-mile area needed for national distribution.

Mr. Murdoch's evening paper project may have been a ploy to enable him to gear up his new printing plant to print existing titles, media insiders said.

"The *Post* always seemed slightly on the wrong side of reality," said a newspaper analyst. "It seemed to be part of a strategy [to move production] rather than part of a publishing plan."

Although still seven months off, another newspaper project that is intriguing U.K. publishing and advertising circles is a new upmarket daily conceived by two Fleet Street veterans with guidance from Saatchi & Saatchi.

Andreas Whittam Smith, former city editor of the *Daily Telegraph*, and Douglas Long, chief executive officer of the Mirror Group until Mr. Maxwell bought it last year, retained Saatchi to research readership and ad potential for the as-yet-unnamed daily and help set up a rate card. Saatchi also will handle the $6 million ad budget for the early October launch.

Like Mr. Shah, Mr. Whittam Smith has been influenced by *USA Today*.

"One thing *USA Today* has absorbed is that readers get their primary news from tv, and newspapers have to complement it," Mr. Whittam Smith said. "In Fleet Street, papers are put together by people who don't watch tv."

He said telephone interviews are being done to research six possible newspaper names: *Arena, Chronicle, Examiner, Independent, Nation* and *24 Hours*.

The upmarket readership Mr. Whittam Smith is targeting with the six-day-a-week, 24-page newspaper (17 pages of editorial and four color pages) is the only growing segment of the British newspaper industry, sources contended.

"The *Times* is up 64% in circulation since 1981 and the *Guardian* by 25%," said Adrian O'Neill, advertising and marketing director of the newspaper Mr. Whittam Smith is planning.

The launch would be the first for an upscale national daily since 1900, Mr. O'Neill said.

"This market has been frozen in time by the unions," said Mr. Whittam Smith. "And Fleet Street management is largely concerned with marshaling 3,000 to 4,000 printers, an industrial relations nightmare. They don't take any notice of the product or marketing or financial control."

Mr. Whittam Smith's paper, like *Today*, will skirt that problem by using computerized production methods.

Other newspaper projects are springing up, but few have found solid financial backing.

Former Fleet Street editor Clive Thornton periodically announces plans for a new Sunday newspaper, and an editor of the Irish independent newspaper group is testing reactions from financial backers to an entertainment-oriented Sunday tabloid tentatively called the *Sunday Globe*.#

New era

(Continued from Page 40)

the *Mirror*, the *Sunday Mirror* and *Sunday People* newspapers in the face of union intransigence.

Analysts estimate the Mirror Group lost $30 million to $42 million in 1985, including $9 million in August alone when publication was suspended for 12 days while Mr. Maxwell battled the unions.

The circulation of the Mirror Group's three papers has dropped steadily since Mr. Maxwell took over and now hovers around 3 million each for the *Mirror*, the *Sunday Mirror* and *Sunday People*.

To slash costs, Mr. Maxwell in December won an unprecedented union agreement allowing him to cut 2,000 of the heavily overstaffed Mirror Group's 6,000 jobs in 1986.

Elsewhere on Fleet Street, the Express Group, whose publications include the *Express* and the *Daily Express*, succumbed in October to a $475 million takeover bid by United Newspapers, which owns provincial newspapers here and trade publications in the U.K. and the U.S.

UN reportedly discovered $22.5 million worth of new equipment in the Express Bldg. that had not even been unwrapped due to union opposition to its use. David Stevens, UN's chairman, has announced plans to cut 2,500 of the Express Group's 6,800 jobs during the next year and up to 1,000 more in the future.

Mr. Terrington said job cuts on Fleet Street are expected to save the U.K.'s newspaper groups millions and put them on the road to financial health in 1986.

"Labor costs of $150 million to $180 million per year will be taken out of Fleet Street starting the second half of 1986," he said. "And hopefully new management will make all the difference, especially at the *Daily Telegraph*."

The conservative *Daily Telegraph*, the last family-owned newspaper on Fleet Street and once one of the most profitable, raised $157 million in June to buy modern equipment and make layoff payments of up to $65,000 per worker to eliminate hundreds of superfluous jobs. But with advertising revenue and circulation falling throughout 1985, the 130-year-old *Daily Telegraph* could not generate enough cash to pay its debts.

In December, the paper announced a $23.7 million pretax loss for the half year, and Canadian industrialist Conrad Black quickly acquired majority ownership of the daily and *Sunday Telegraph* in a $43 million refinancing package.

Mr. Black had acquired a 15% share in the paper in June for $14 million. Although he has been portrayed in the U.K. press as a journalist-hating invader, he is expected to give the *Daily Telegraph's* septuagenarian management a much-needed shakeup.#

What they say about Shah's new venture

Can Eddy Shah succeed? Will the launch of his new morning tabloid Today *be the catalyst that turns around the U.K.'s ailing newspaper industry?* ADVERTISING AGE *asked the experts. Here are their responses:*

Derek Terrington, newspaper and publishing analyst, Grieveson, Grant & Co.:

"He's got a hard job on hand. This market has got some very strong established brands that have been around since the turn of the century. People are very conservative about their newspapers. People will sample it at the beginning, then possibly the circulation will go down. He's got a very hard marketing job ahead.

CAROLINE MARLAND

DEREK TERRINGTON

"He's not exactly asking a lot [for ads]. On a continuing basis, the question is, will there be more checks [from advertisers]?"

Ray Morgan, director of Ray Morgan & Partners, media buyers:

"The relatively small circulation—1.5 million—won't in itself take Fleet Street apart at the seams. It's the dramatic impact Shah's had on people like Rupert Murdoch and Robert Maxwell, who are now busily reorganizing their labor relations. I think Shah has been quite a catalyst. He's made Murdoch confident enough to make a fairly preemptive move [firing 5,500 print workers].

"Shah is able to produce a viable newspaper at a fraction—maybe 20%—of the cost of producing traditional newspapers. I think as a marketing exercise we've yet to see how it looks, but as a piece of factory planning it looks extraordinarily successful."

Caroline Marland, advertising director of the *Guardian*:

"Shah is an amazing catalyst on Fleet Street. At least another six papers are on the tracks, ready to go. Some won't survive. I think Shah will.

He has terrific good will from the advertising agencies. It will be interesting to see how far that good will extends if everything is not right from the very beginning—there are some rumors that his computer setup isn't all it should be.

"Shah has escalated what I think would have taken another 10 years on Fleet Street. We've all had to react to that. He's like the emperor who had no clothes. Shah has no product yet, but everyone is scared as hell of him."

Roy Langridge, assistant chief executive of Ted Bates Holdings:

"Shah's is an extremely bold and very imaginative venture. I think it will do a hell of a lot to revitalize the market—newspapers have been uninteresting as media. He'll have to fight very hard when the initial euphoria wears off, but I think he'll be a fixture in the marketplace. He won't have an easy ride, but I think there is no question he'll succeed."#

Don't Lose Money on Foreign Transactions

Fluctuating exchange rates can run up costs or eat up receipts. Worldollar protects you from disastrous fluctuations without depriving you of any profits you make when the exchange rate is favorable. This is not an exchange-traded option with its many limitations; neither is it futures or forwards. For a small fee, we give you the best of all options, effective from time of commitment to actual payment / receipt.

Worldollar Corp. 488 7th Ave, New York 10018
(212) 947-8297 Telex 269356

Newspaper Advertising MRCS/SAU Inches

December 1985 vs. December 1984

AKRON, OH

	1985 Full Run	1985 Part Run	1984 Full Run	1984 Part Run
Beacon Journal (E)	103,160	37,230	112,137	25,620
Beacon Journal (S)	95,684	21,495	89,514	8,559
Grand Total	198,844	58,725	201,651	34,179

NOTE: Part run figures supplied by publisher to Media Records.

ATLANTA, GA

Constitution (M)	178,923	75,299	176,223	45,289
Journal (E)	187,129	75,185	188,173	51,042
Journal & Constitution (S)	123,609	96,347	126,762	84,565
Journal & Constitution (Sat)	40,011	——	41,001	——
Grand Total	529,672	246,831	532,159	180,896

NOTE: Constitution Morning and Journal Evening published five days a week only.

BALTIMORE, MD

News-American (S)	39,533	13,778	42,835	6,892
News-American (E)	43,507	7,994	48,964	9,072
Sun (M)	129,735	7,512	124,844	20,477
Sun (E)	100,843	7,502	97,787	18,460
Sun (S)	172,457	53,723	144,748	41,815
Grand Total	486,075	90,509	459,178	98,716

BERGEN COUNTY, NJ

Record (E)	166,961	31,604	157,687	25,778
Record (S)	168,571	47,114	148,873	37,325
Grand Total	335,532	78,718	306,560	63,103

NOTE: Record Evening published five days a week only.

BOSTON, MA

Herald (M)	53,538	——	42,650	——
Herald (S)	24,979	43,373	18,874	28,786
Globe (M)	148,063	14,926	145,659	12,576
Globe (S)	180,644	42,927	167,904	25,709
Grand Total	407,224	101,226	375,087	67,071

BUFFALO, NY

News (AD)	121,341	23,644	112,920	32,545
News (S)	82,137	24,065	46,243	37,371
Grand Total	203,478	47,709	159,163	69,916

CAMDEN, NJ

Courier-Post (E)	117,060	24,079	104,195	25,150
Courier-Post (S)	66,181	25,592	43,109	12,165
Grand Total	183,241	49,671	147,304	37,315

CHARLOTTE, NC

News (E)	——	——	73,755	——
Observer (M)	135,368	——	132,066	——
Observer (S)	74,149	——	75,767	——
Grand Total	209,517	——	281,588	——

NOTE: News Evening ceased publication November 1, 1985. Part run figures not available.

CHICAGO, IL

Sun-Times (M)	126,939	89,545	127,126	52,932
Sun-Times (S)	78,577	46,419	71,522	35,099
*Tribune (M)	210,846	320,092	247,966	321,355
*Tribune (S)	140,231	132,064	166,015	111,361

NOTE: Tribune figures supplied by publisher to Media Records. 1985 figures represent advertising for 11/25/85 to 12/29/85. Tribune All Day changed to Morning publication effective August 19, 1985.

CINCINNATI, OH

Enquirer (M)	191,193	10,221	189,175	14,196
Enquirer (S)	164,941	20,585	135,093	18,662
Post (E)	94,641	21,102	96,074	45,902
Grand Total	450,775	51,908	420,342	78,760

CLEVELAND, OH

Plain Dealer (M)	154,095	31,421	153,409	20,455
Plain Dealer (S)	139,720	8,423	118,522	5,936
Grand Total	293,815	39,844	271,931	26,391

DALLAS, TX

News (M)	329,670	9,090	345,168	15,682
News (S)	197,381	31,907	180,353	11,123
Times-Herald (AD)	269,246	34,909	304,036	23,959
Times-Herald (S)	153,787	32,428	149,756	11,317
Grand Total	950,084	108,334	979,313	62,081

DENVER, CO

Rocky Mt. News (M)	282,033	2,535	302,894	861
Rocky Mt. News (S)	126,616	1,899	112,203	3,155
Post (M)	205,002	1,949	209,497	9,681
Post (S)	154,390	1,919	133,797	3,908
Grand Total	768,041	8,302	758,391	17,606

DETROIT, MI

Free Press (M)	106,529	44,420	105,154	37,980
Free Press (S)	66,624	38,387	50,101	29,827
News (AD)	148,090	58,403	155,770	48,589
News (S)	93,663	59,957	95,211	24,610
Grand Total	414,906	197,167	406,245	138,706

FORT LAUDERDALE, FL

News & Sun-Sentinel (S)	139,718	——	139,298	——
Sun-Sentinel (M)	291,978	——	329,584	——
Grand Total	431,696	——	468,882	——

NOTE: Part run figures not available. Morning figures include the Saturday Edition.

FORT WAYNE, IN

Journal Gazette (M)	95,514	——	82,986	——
Journal Gazette (S)	90,239	——	72,942	——
News Sentinel (E)	104,991	——	95,583	——
Grand Total	290,744	——	251,511	——

NOTE: Part run figures not available.

*FORT WORTH, TX

Star Telegram (M)	316,100	83,159	312,064	57,765
Star Telegram (E)	239,279	77,511	221,046	57,492
Star Telegram (S)	192,704	56,121	152,632	58,245
Grand Total	748,083	216,791	685,742	173,502

NOTE: Figures supplied by publisher to Media Records.

GREENWICH/STAMFORD, CT

Time (E)	80,110	853	81,729	——
Time (S)	76,255	——	58,306	——
Advocate (E)	115,302	3,039	111,973	1,544
Advocate (S)	80,626	——	60,586	——
Grand Total	352,293	3,892	312,594	1,544

HARTFORD, CT

Courant (M)	157,940	35,334	150,779	36,267
Courant (S)	92,228	144,263	89,691	123,856
Grand Total	250,168	179,597	240,470	160,123

HONOLULU, HI

Advertiser (M)	144,988	——	151,889	——
Star-Bulletin (E)	142,653	——	146,312	——
Star-Bulletin & Advertiser (S)	105,002	——	88,422	——
Grand Total	392,643	——	386,603	——

HOUSTON, TX

Chronicle (AD)	261,181	46,292	321,932	41,738
Chronicle (S)	146,322	53,120	156,527	39,682
Post (M)	182,814	39,173	214,053	49,364
Post (S)	106,416	37,197	93,561	42,826
Grand Total	696,733	175,782	786,073	173,610

LONG BEACH, CA

Press Telegram (M)	120,563	——	114,623	——
Press Telegram (S)	77,500	——	66,063	——
Grand Total	198,063	——	180,665	——

NOTE: Part run figures not available.

LONG ISLAND, NY

Newsday (E)	169,673	65,844	154,697	54,742
Newsday (S)	120,199	104,869	100,521	104,960
Grand Total	289,872	170,713	255,218	159,702

LOS ANGELES, CA

Times (M)	358,346	251,058	357,100	257,766
Times (S)	191,400	128,071	184,221	96,138
Herald-Examiner (M)	73,663	12,450	54,947	22,281
Herald Examiner (S)	18,571	12,811	13,310	8,238
Grand Total	641,980	404,390	609,578	384,423

LOS ANGELES/SAN FERNANDO VALLEY, CA

News (M)	218,457	33,763	194,993	49,264
News (S)	113,493	3,457	73,137	28,320
Grand Total	331,950	37,220	268,130	77,584

*LOS ANGELES/TORRANCE, CA

Breeze (E & S)	264,135	——	235,166	——
Grand Total	264,135	——	235,166	——

NOTE: Figures supplied by publisher to Media Records.

*LOUISVILLE, KY

Courier Journal (M)	108,634	63,206	107,408	46,143
Courier Journal (S)	85,347	85,995	76,236	71,369
Times (E)	94,244	69,884	100,599	60,455
Grand Total	288,225	219,085	284,243	177,967

NOTE: Figures supplied by publisher to Media Records.

MIAMI, FL

Herald (M)	195,355	——	216,396	——
Herald (S)	123,348	——	115,940	——
News (E)	59,906	——	66,302	——
Grand Total	378,609	——	398,638	——

NOTE: Part run figures not available.

MINNEAPOLIS, MN

Star & Tribune (AD)	136,949	22,385	132,011	24,947
Star & Tribune (S)	158,045	2,066	140,921	3,147
Star & Tribune (Sat)	21,815	——	24,342	——
Grand Total	316,809	24,451	297,274	27,994

*NASHVILLE, TN

Banner (E)	121,891	——	111,874	——
Tennessean (M)	121,485	——	113,797	——
Tennessean (S)	110,020	——	87,007	——
Grand Total	353,396	——	312,678	——

NOTE: 1985 figures supplied by publisher to Media Records.

NEW BRUNSWICK, NJ

Home News (E)	100,859	891	——	——
Home News (S)	96,017	5,058	——	——
Grand Total	196,676	5,949	——	——

NOTE: 1984 figures not available.

NEW YORK, NY

Times (M)	182,844	15,172	174,065	16,127
Times (S)	192,372	119,098	182,311	112,061
News (M)	70,422	101,339	63,368	120,740
News (S)	40,715	133,742	33,453	165,468
Post (AD)	59,733	1,439	60,586	934
Grand Total	546,086	370,781	513,883	355,330

NEWARK, NJ

Star Ledger (M)	212,719	7,703	196,319	6,302
Star Ledger (S)	193,588	47,935	159,407	48,856
Grand Total	406,287	55,638	355,726	55,158

OAKLAND, CA

Tribune (M)	103,790	74,612	101,412	55,627
Tribune (S)	57,158	52,009	50,804	27,336
Grand Total	160,948	126,621	152,216	82,963

OCEANSIDE, CA

Blade-Tribune (E)	105,613	2,185	——	——
Blade-Tribune (S)	63,583	——	——	——
Grand Total	169,196	2,185	——	——

NOTE: 1984 figures not available.

ORANGE COUNTY, CA

Register (AD)	307,457	96,817	309,376	71,681
Register (S)	158,229	9,980	131,345	8,895
Grand Total	465,686	106,797	440,721	80,576

PHILADELPHIA, PA

Inquirer (M)	188,861	43,475	179,722	55,904
Inquirer (S)	146,754	59,798	135,365	48,685
News (E)	98,367	10,909	79,673	13,431
Grand Total	433,982	114,182	394,760	118,020

*PHOENIX, AZ

Arizona Republic (M)	353,711	20,431	400,916	35,412
Arizona Republic (S)	190,054	——	221,298	——
Gazette (E)	338,389	20,623	434,421	35,748
Grand Total	882,154	41,054	1,056,635	71,160

NOTE: Figures supplied by publisher to Media Records.

ROCHESTER, NY

Democrat & Chronicle (M)	88,997	29,994	96,311	20,051
Democrat & Chronicle (S)	90,245	37,811	78,048	22,777
Times Union (E)	72,165	22,457	74,230	18,461
Grand Total	251,407	81,262	246,589	61,289

NOTE: Times Union Evening published five days a week only.

SACRAMENTO, CA

Bee (M)	244,289	23,962	240,314	21,376
Bee (S)	126,944	22,554	114,343	8,881
Grand Total	371,233	46,416	354,657	30,257

*ST. LOUIS, MO

Post Dispatch (M)	127,827	39,743	114,442	39,212
Post Dispatch (S)	152,135	——	148,234	——
Grand Total	279,962	39,743	262,676	39,212

NOTE: Figures supplied by publisher to Media Records.

ST. PAUL, MN

Pioneer Press Dispatch (AD)	112,501	——	88,437	——
Pioneer Press Dispatch (S)	124,243	——	105,857	——
Dispatch (E)	——	——	95,691	——
Grand Total	236,744	——	289,985	——

NOTE: Part run figures not available. Pioneer Press Morning and Dispatch Evening combined to one edition, Pioneer Press Dispatch All Day effective January 2, 1985. The Pioneer Press Morning activity is shown in the Pioneer Press Dispatch All Day listing. Pioneer Press Sunday changed to Pioneer Press Dispatch Sunday effective January 5, 1985. Prior to January 2, 1985, Pioneer Press Morning and Dispatch Evening had a combined Saturday edition with the activity shown only in the Dispatch Evening.

SAN ANTONIO, TX

Express-News (AD)	160,459	36,405	142,597	27,505
Express-News (S)	98,648	51,072	96,268	38,957
Express-News (Sat)	39,283	——	45,560	——
Light (AD)	143,003	40,533	128,452	42,472
Light (S)	106,393	31,994	97,735	26,837
Light (Sat)	33,589	——	43,138	——
Grand Total	581,365	160,004	553,750	135,771

NOTE: Light All Day published five days a week only. Light Evening changed to Light All Day effective January 1985.

SAN DIEGO, CA

Union (M)	247,576	38,290	255,235	18,115
Union (S)	149,230	——	135,933	——
Tribune (E)	255,509	37,195	253,954	17,656
Grand Total	652,315	75,485	645,122	35,771

SAN FRANCISCO, CA

Chronicle (M)	145,297	90,037	138,934	74,323
Examiner (E)	141,121	88,371	134,582	73,734
Examiner & Chronicle (S)	81,620	85,302	74,293	63,180
Grand Total	368,038	241,710	347,809	211,237

SAN JOSE, CA

Mercury News (AD)	306,430	32,416	365,367	34,762
Mercury News (S)	178,950	——	160,716	1,274
Grand Total	485,380	32,416	466,083	36,036

SHREVEPORT, LA

Journal (E)	96,903	6,705	93,779	7,731
Times (M)	129,944	18,350	130,499	18,519
Times (S)	81,998	12,756	81,281	14,482
Grand Total	308,845	37,811	305,559	40,732

*STATE COLLEGE, PA

Centre Times (E)	93,385	1,355	94,726	1,084
Centre Times (S)	43,599	254	35,751	——
Grand Total	136,984	1,609	130,477	1,084

NOTE: Figures supplied by publisher to Media Records.

SYRACUSE, NY

Herald Journal (E)	102,614	32,114	98,585	40,384
Herald American (S)	80,100	52,516	57,814	27,277
Post-Standard (M)	88,703	36,024	80,186	41,590
Grand Total	251,417	120,654	236,585	109,251

*TAMPA, FL

Tribune (AD&S)	362,073	129,079	624,943	161,151
Grand Total	362,073	129,079	624,943	161,151

NOTE: Figures supplied by publisher to Media Records.

*TOLEDO, OH

Blade (E)	136,554	——	120,580	——
Blade (S)	126,739	——	106,783	——
Grand Total	263,293	——	227,363	——

NOTE: Figures supplied by publisher to Media Records.

WASHINGTON, DC

Post (M)	269,117	48,135	266,868	51,210
Post (S)	153,396	73,527	156,606	41,818
Grand Total	422,513	121,662	423,474	93,028
Alexandria Journal (M)	65,846	——	55,881	510
Prince George's Journal (M)	56,511	626	49,874	1,129
Montgomery Journal (M)	59,451	294	51,369	1,129
Fairfax Journal (M)	66,951	1,602	58,685	510
Arlington Journal (M)	66,214	——	56,212	510

NOTE: Alexandria Journal Morning, Prince George's Journal Morning, Montgomery Journal Morning, Fairfax Journal Morning, and Arlington Journal Morning published five days a week only.

WESTCHESTER ROCKLAND, NY

Reporter Dispatch (E)	95,034	15,588	90,937	16,722
Reporter Dispatch (S)	115,052	17,821	65,326	35,063
Grand Total	210,086	33,409	156,263	51,785

WICHITA, KS

Eagle-Beacon (M)	134,584	——	146,755	——
Eagle-Beacon (S)	109,238	——	93,155	——
Grand Total	243,822	——	239,910	——

NOTE: Part run figures not available.

Source: Media Records

This data has been provided by Media Records for exclusive publication in Advertising Age and may not be reprinted or published in any form without explicit permission from Media Records. All newspapers represented are subscribers to Media Records. For those newspapers that subscribe to Media Records National Advertising Reporting Service, Total Advertising data shown has been supplied by the publisher to Media Records and included in this compilation. All publisher supplied figures are converted to MRCS/SAU inches by Media Records. These newspapers are indicated with an asterisk (*).

REPORTING METHODOLOGY

Media Records continues to measure in linage but due to the introduction of the SAU 6 column format Media Records has designed and developed a methodology with the approval of our subscribers, the INAME Measurements Committee, The ANPA/NAB Working Committee, The AAAA Newspaper Committee, and other industry groups.

The approved methodology is titled The Media Records Conversion System (MRCS) and is based upon the printed page area of each product of the newspaper and is a five step approach as follows:

1. Measure Printed Page.....
   Width and Depth in Inches.
2. Determine Square Inches of Page.....
   Multiply Width by Depth Inches.
3. Determine the Number of SAU Inches of Page.....
   Divide the Square Inches by 2.0625 (SAU Inches).
4. Measure the Total Lines of the Page.....
   Multiply Column Depth Agate Lines by the Number of Columns on the Page.
5. Determine the Factor for Converting Measured Lines to Reported SAU Inches.....
   Divide the Total Lines of Page by the Number of MRCS/SAU Inches of the Page.